

Case Overview

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After you submit a new incident report, you will automatically be directed to the Case Overview page for that case. All information entered in the Add Initial Report Form will display in the Overview:

Case Menu: These options will appear if you expand a case by clicking on the folder icon next to the case number.

Case number is automatically generated

Case Toolbar: Add [Attachment](#), Link Cases, [Watch Case](#), Add To [Docket](#), and Case Tools (Restrict Case/Preservation Hold)

See Steps to Complete

Case Types, Attributes, and Linked Cases will display in this area

When entering a case you will be automatically added to the case according to your role. Professional staff may make edits to Team Members as necessary.

Case Overview Page Details:

- Case #:** K20-2061 (25372)
- Case Types:**
 - Other (See PC)
 - Clery (Clery)
- Attributes:**
 - Alcohol
 - Linked Cases
 - None
- Incident Description:** 1001
- Report Information:**
 - Received:** 5/5/2020 12:42:00 PM
 - Reported On:** 5/5/2020 12:42:00 PM
 - Created By:** Alexandra Hall
 - Method of Contact:** University Police
 - Jurisdiction:** University Police
- Incident Date/Time Information:**
 - Is Exact Date Of Incident Known:** Yes
 - Is Exact Time Of Incident Known:** No
 - Date Of Incident:** 5/5/2020
 - Date Of Incident Description:**
- Incident Location Information:**
 - Is Exact Location Known:** Yes
 - Location:** Pharmacy Hall
 - Address Line 1:** 180 McCormick Rd
 - Address Line 2:**
 - City:** Charlottesville
- Steps To Complete:**
 - NonPC:**
 - ☐ Considered Other Classifications
 - ☐ Received
 - Clery:**
 - ☐ Clery Assessment Completed
- Involved Parties:**

Role	Name	Relationship	Actions
Employee	Shelley Gibson (see Tool)	Employee	View Profile
Student	Alexandra Hall (see Tool)	Student	View Profile
Unknown	Unknown	Student	View Profile
- Team Members:**

Link ID	First Name	Last Name	Role	Classification
see Tool	Alexandra	Hall	Case Owner	NonPC
- Evaluation Panels:**
 - Classifications:** This Case

Case Tools: [Icons for Print, Export, Audit, etc.]

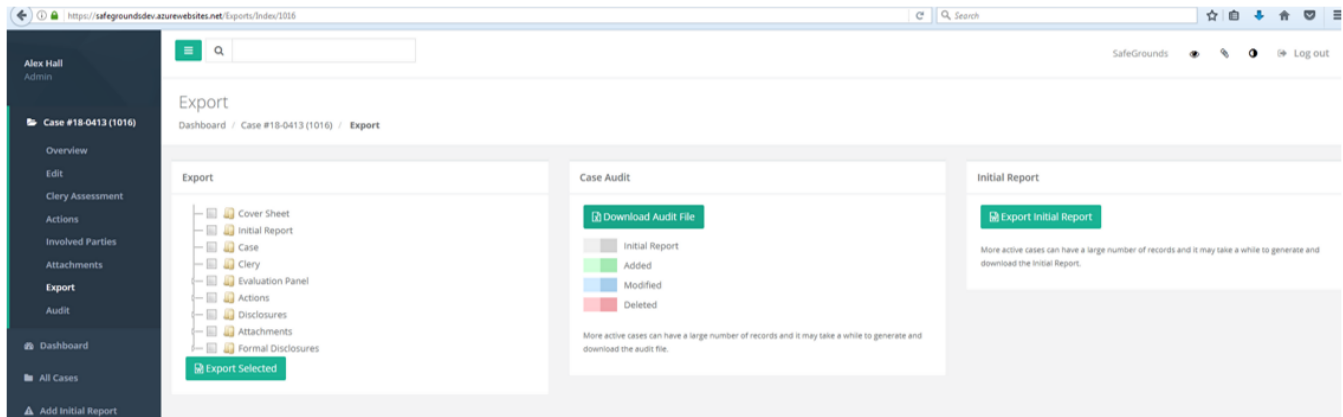
Case Menu

Each time you view a case, you will see a series of menu options under the Case on the left-hand side of your screen; this is referred to as the Case Menu. Each of those menu items serves the following function:

- **Overview:** The view shown above is a Case Overview, providing you with a snapshot of the case.
- **Clery Assessment:** Where the Clery Compliance officer (or designee) completes all Clery violation/crime assessments and/or Timely Warning Assessments (see [Clery Act Compliance](#))
- **Evaluation Panel (PC Only):** Record of Title IX Evaluation Panels in a Prohibited Conduct case
- **Decision Matrix (PC Only):** Record of the determinations made by the Title IX Coordinator regarding University Resolution
- **Resolution (PC Only):** Record of the steps taken to resolve a case under Title IX Resolution process
- **Edit:** Where you will go to edit Case Information (see [Editing a Case](#))
- **Actions:** Record of all actions taken to respond to a report/case (see [Actions](#))
- **Email:** Send and document emails from within SafeGrounds (see [Email Functionality](#))
- **Subscriptions:** Allows you to receive notifications about the case (see [Case Subscriptions](#))
- **Disclosures:** Record of all disclosures to law enforcement entities
- **Involved Parties:** Information about all involved parties (see sub-sections in [Profiles and Involved Parties](#), [Adding a Report](#), and [Editing a Case](#))
- **Attachments:** Record of all case evidence/attachments (see [Attachments](#))
- **Merge:** Ability to merge or combine case with another (see [Merging/Combining Cases](#))
- **Export:** Printing (see below)
- **Audit (Limited Access):** Record of all changes to case record

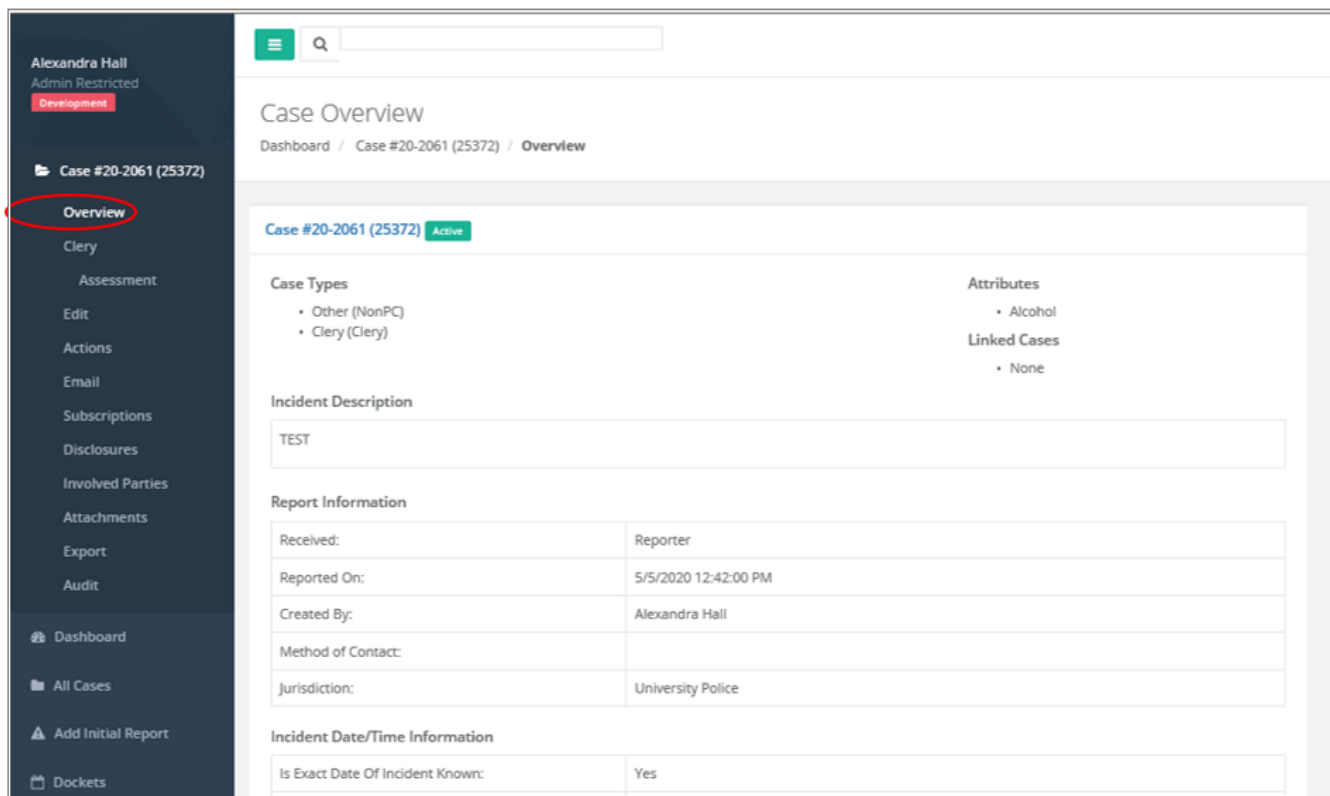
Case Export or Printing Function

SafeGrounds allows the user to print any or all parts of a case via the 'Export' function listed in the Case Menu. When you select Export, you will see the view below. You may select one or more aspects of the case in the 'Export' (far left) box, or just the 'Initial Report' (far right box) depending on what information you wish to print. After selecting the information that you wish to print, click 'Export Selected' and you will receive a Microsoft Word document that you can print. The average user will have no use for 'Download Audit File', as this is a log of every single selection or change made to the case since initial report.



Case Information

The Case Information box in the Case Overview screen contains all of the information about the incident, which was entered through the Add Initial Report Form (see [Adding a Report](#) or through *Just Report It!*).



The screenshot shows the 'Case Overview' page for Case #20-2061 (25372). The left sidebar contains navigation links for Overview, Clery, Assessment, Edit, Actions, Email, Subscriptions, Disclosures, Involved Parties, Attachments, Export, Audit, Dashboard, All Cases, Add Initial Report, Dockets, Queries, Search, and Admin. The main content area includes sections for Case Types, Incident Description, Report Information, Incident Date/Time Information, Incident Location Information, Steps To Complete, Involved Parties, and Team Members. Blue callout boxes highlight the 'Steps To Complete' section, the 'Involved Parties' table, and the 'Team Members' table.

Steps to Complete

The 'Steps to Complete' section is a reminder about all of the basic steps which must be taken in a given case. **Steps to complete will vary based on the Case Types and Case Classifications added to a given case.** Each time that a step is completed, the box to its left will be checked green, and a date /time stamp will show when that step was taken.

Considered Other Classifications: This step will appear for ALL cases, and the Case Owner in that case (or that "lane," if there is more than one) is expected to complete this step at the time that a case is created or reviewed. See [Case Referral Protocol](#) for additional information. If a case is referred for review, there will be green check boxes which show "Referred as [Potential Case Type]" for each referral

Reviewed: This step will appear for all PC and NonPC cases, and Case Managers in those respective areas will complete this step after they review each case for correct and complete documentation and data.

Clery Assessment Completed: This step will be added to any case with a Clery Case Type/Classification. The University's Clery Compliance Coordinator, or his designee, will complete this step for all cases.

DOC Outreach Completed: This step will appear for PC cases only, and should be completed by the Dean on Point as applicable. See [Prohibited Conduct Actions and Preferences](#) for more information.

Initial Assessment Completed: This step will appear for PC cases only, and should be completed by the Title IX Coordinator as applicable. See [Prohibited Conduct Actions and Preferences](#) for more information.

Evaluation Panel: This step will appear for PC cases only, and will be completed when the Title IX Evaluation Panel completes its review of a case.

For more information about the 'Considered Other Classifications (case referral) function', see [Appendix G](#).

Involved Parties

The Involved Parties section displays information about all individuals involved in a given case/incident/report; for more information, see sub-sections: [Profiles and Involved Parties](#), [Adding a Report](#), [Reporter and Involved Party Information](#), and [Editing Involved Parties](#).

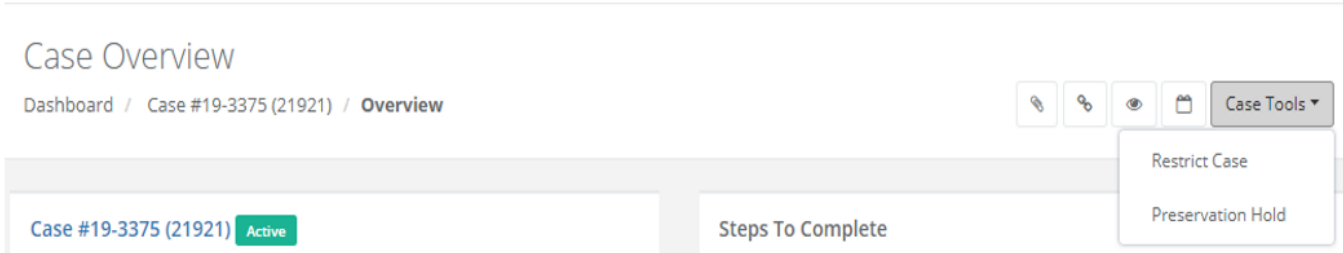
Team Members

Team Members indicate any University staff who has/have a role in responding to a reported incident or concern. Team Member roles are different than User Roles, in that the Team Member role is specific to a certain case, while the User Role applies to the overall SafeGrounds system; for more information about User Roles, see [Overview of User Roles](#) and [Appendix I: User Roles](#). Some case access and functionality is based on User Roles, while some case access and functionality is based on whether a user is assigned as a Team Member on a case; as such, *it is important that you assign all appropriate Team Member roles in a case that you are responsible for.*





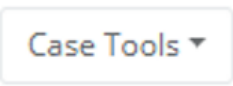
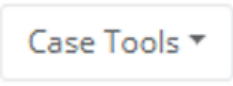
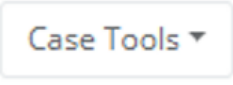
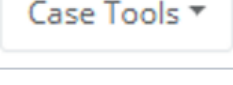
For a list of all Team Member Role descriptions, and a description of when or how to add or edit Team Members on a case, see [Team Members](#).

Case Tool Bar

In the top-right corner of the Overview Page, you will see a series of buttons referred to as the **Case Tool Bar**



Descriptions of the options in the Tool Bar are as follows:

Icon	Option	Purpose
	Add Attachment	Attachments made here are visible to anyone with access to the case. For more information, see: Attachments
	Link Case	Use this feature to link two or more related cases. For more information, see: Appendix M, Linking Cases
	Watch Case	If you choose to watch a case the case will show in a widget on your dashboard. Allows you to easily monitor the status of a case.
	Add To Docket	Shortcut to add a case to the next docket for the appropriate classification. For more information, see: Appendix F: Dockets
	Restrict Case	Allows user to restrict a case, which will lock access down to designated team members only. For more information, see: Restricted Cases .
	Preservation Hold	Preservation Hold will prevent a case from being purged from the system due to data retention rules.
	Edit Classification(s)	Allows user to change the Classification status of a case. If more than one Classification exists for a case, user may also be given the option to remove a classification.
	Close Case	Allows user to close the case. Once chosen, the green "active" box next to the case number will be replaced by a red closed box and the date the case was closed will be indicated.

Case Subscriptions

When viewing a case, the **Case Subscriptions** section allows the user to subscribe to specific parts of a case. If the user is to subscribe to any of the available subscriptions listed, that subscription will be listed in the **Your Subscriptions** column and a green notification banner will be shown in the top right of the screen validating the subscription. Once subscribed, the user will be notified of any changes or actions pertaining to the subscription via email and in the **Notifications** section in the main menu. The user may also unsubscribe from any portion of the case. Upon clicking the subscribe action button, a prompt may appear asking for further specification, usually using a dropdown menu. You can also view all your subscriptions, not just the current case subscriptions, by navigating to the [User Account](#) in the Main Menu and clicking **Subscriptions**.

Alexandra D'Agostino
CACS Admin
Deactivated

Case #22-0657 (53359)
Overview
Clery
Assessment
Edit Case
Actions
Email
Subscriptions
Disclosures
Involved Parties
Attachments
Merge
Export
Audit

Dashboard
All Cases
Add Initial Report
Dockets
Notifications 0
Search
Settings

Filter Classifications ⓘ ? Help ⌵ Log out

Case Subscriptions
Case #22-0657 (53359) / Case Subscriptions

Available Subscriptions

Name	Actions
An involved party is added to the case	Subscribe
An involved party with a specific role is added to the case	Subscribe
An involved parties identity becomes known	Subscribe
An action is assigned to me	Subscribe
Specific action is initiated	Subscribe

Your Subscriptions

Name	Last Ran	Actions
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Click Edit tab
to edit case
information